



CITY OF SAN ANTONIO

P.O. Box 839966
SAN ANTONIO, TEXAS 78283-3966

ADDENDUM I

SUBJECT: Better Buildings Residential Assessment and Auditing Services, (RFQ 11-026), Schedule to Open: February 1, 2011; Date of Issue: December 20, 2010

FROM: Denise D. Gallegos, C.P.M., CPPB, Purchasing & Contract Administrator

DATE: January 19, 2011

This notice shall serve as Addendum No. I to the above-referenced Request for Qualifications and shall become part of the original proposal package and must be returned with proposal on or before the due date.

THE ABOVE MENTIONED REQUEST FOR QUALIFICATIONS IS HEREBY AMENDED AS FOLLOWS:

- 1. Add: Attachment 1 – “SBEDA Presentation” is posted as a separate document.**
- 2. Page 3, Section II, SCOPE OF SERVICES – TASK 1, Change Section to Read:**

“TASK 1: RESIDENTIAL ENERGY ASSESSMENTS

The Better Buildings Program will provide CPS Energy Customers access to residential energy assessors who can provide guidance to homeowners about the types of replacement measures that could provide the greatest impact for energy savings. The goal of this service is to provide homeowners background information about the current status of their appliances, heating and cooling systems, building envelope, and water use, and supplement this information with the potential impact and costs of replacement measures that will lead to reduced energy consumption. With this information in hand, the customer will be able to make informed decisions about proceeding with energy efficiency upgrades to their home. The customer is going to pay a nominal fee for the services and therefore, the only stipulation for qualifying is the customer’s desire to enroll in the program and receive the assessment. It will be up to the vendor to schedule customers in the most convenient, efficient, and timely manner with the customer. The vendor will be handling large volumes of customer assessments at a certain point, it’s the vendor’s responsibility to keep pace with demand and keep customer satisfaction high.

Respondents should be able to perform on-site energy assessments to help homeowners identify applicable energy efficiency measure that will reduce their energy costs, both for low-cost/no-cost efficiency measures as well as energy efficiency measures that require a capital investment.

The tasks required of the respondent to perform the residential energy assessment shall consist of:

- Conduct the energy assessment at the site of the Better Buildings customer in the format specified by CPS Energy.
- Perform a walkthrough of each customer's residence and assess and inventory the current condition, performance, and/or status that contribute to energy consumption and conservation of the following measures including but not limited to:
 - Appliances and Electronics
 - Refrigerators
 - Washing Machines
 - Clothes Dryers
 - Lighting
 - Lighting Fixtures
 - Ceiling Fans
 - CFLs
 - LEDs
 - Exterior Lighting
 - Heating and Cooling Systems
 - Central Air Conditioners and Heat Pumps
 - Window Unit Air Conditioners
 - Air Ducts
 - Pipe Wrapping
 - Water Heater, Piping and Insulation
 - Building Envelope
 - Wall, Attic, and Floor Insulation
 - Roofing
 - Windows
 - Water
 - Toilets
 - Fixtures/Showerheads
 - Pool Pump
- Following the assessment and inventory, provide recommendations for the potential replacement of assessed items with measures that will lead to reduced energy consumption in a report to be left with the customer. The potential replacement measures shall be considered from a list of Better Buildings Program approved measures. The approved measures list will include items rebateable by CPS Energy. These recommendations shall be developed at the time of visit and shared with the homeowner. Findings shall be presented in the following manner:
 - For each measure assessed, identify if replacement of the measure should be of high, low, or no priority for expected energy savings
 - For each measure assessed, identify if replacement of the measure would be of high, medium, or low to no cost
 - In addition to sharing the findings, the respondent shall:
 - Note in the report which measures customers expressed an interest in replacing;
 - Provide education to customer about energy efficiency and water saving measures; and

- Provide an overview of next steps for identifying a contractor and securing financing through the Better Buildings Program
- The respondent shall compile the findings report developed at the customer site and submit electronically to CPS Energy in a format specified by CPS Energy.
- Respondent will be required to obtain a liability waiver and any additional legal documentation prior to entering the customer's home
- Respondent will be required to document and submit web-based weekly and report monthly the number of audit/assessments completed and number of hours worked within this contract, including numbers of surveys completed in a format specified by the City of San Antonio

NOTE: A customer does not have to go through a progression line of audits, they may choose to go directly to Task 2 Energy Audits or stop at Task 1 and self-assessment levels. However, if a customer wants access to financing options for renewable energy installations, a Task 2 Energy Audit is required.

QUESTIONS SUBMITTED IN ACCORDANCE WITH SECTION XII – RESTRICTIONS ON COMMUNICATIONS:

Question 1: Will this program be working jointly with the CPS Energy Weatherization Services Program? If not, do you know which CPS Programs this Better Buildings project plans to work with, as well as whom within CPS is spearheading that effort?

Response: No, the Better Buildings Program will not be working jointly with the CPS Energy Weatherization Services Program. The City of San Antonio has partnered with CPS Energy to deliver customized “energy concierge” services to provide a seamless process for program participants to have access to expert analysis, support and incentives to improve the performance of their home or business.

Question 2: Regarding Section IX. Response Requirements, Item F, Financial Information, Pg 9; please clarify language “audited by an independent Certified Public Accountant. Will “compiled” or “reviewed” financial statements by a Certified Public Accountant be accepted?

Response: The respondent can submit compiled or reviewed statements and the numbers will be compiled as usual; however they may not be included in our analysis with those that adhere to the RFQ requirements by submitting audited statements.

Question 3: Relating to Task 2 only, are there RESNET certified raters/auditors that meet the SBEDA requirements (certified as SBE, WBE, MBE and/or AABE through SCTRCA)?

Response: Respondents are encouraged to contact the Small Business Economic Development Advocacy office at (210) 207-3900 to examine if there are RESNET certified raters/auditors that meet SBEDA requirements.

Question 4: In regards to the Reference Form, should we only provide references for the prime firm or are we able to show subconsultant references too (i.e., 2 references for prime firm and 1 reference for a subconsultant firm)?

Response: All References should be from a Prime Firm.

Question 5: What information is to be included as part of the “Appendices” which is referenced on page 12 where it discusses the proposal page limitation?

- Response: Appendices can be inclusive of other relevant material/documentation for consideration by the evaluation committee.
- Question 6: Are the forms to be included in Tabs H, I, J, K, M, and O counted as part of the 40-page limit? In reviewing Item 11 on page 26. What exactly is meant by and what kind of information is the City looking for in regards to “experience with managing multiple funding sources for various measures?”
- Response: Yes, the forms to be included in Tabs H, I, J, K, M, and O counted are counted as part of the 40-page limit. The City would like for Respondents to consider that audit and assessment services can be funded by multiple sources i.e., additional grant funds, other local funds or by the resident.
- Question 7: What is the anticipated relative distribution of the \$750,000 budget between Task 1 and Task 2?
- Response: The City has budgeted \$375,000 for Task 1 and \$375,000 for Task 2.
- Question 8: What is the anticipated workload (units per time period)?
- Response: The City of San Antonio nor CPS Energy have an anticipated workload or units per time period requirement.
- Question 9: How will the City and/or CPS determine which houses qualify for assessments? And how will those assessments be scheduled?
- Response: Please refer to Amended Section II, Scope of Services – TASK 1, noted above.
- Question 10: What is the anticipated level of ARRA reporting?
- Response: Please refer to Amended Section II, Scope of Services – TASK 1, noted above.
- Question 11: What is the energy savings goal of the program relating to kWh/sq ft (i.e., where are things now and where would the City/CPS like things to be)?
- Response: The Better Buildings Program does not have a kWh/sq ft goal. The program does have a target to retrofit 5100 homes during the grant period.
- Question 12: How many contractors will be awarded this contract?
- Response: An evaluation committee will determine if the contract will be awarded to one or more respondents.
- Question 13: Explain sentence on page 6 “Homeowner may elect to go through the process without a requirement of a prior Home Energy Survey or Diagnostic Energy Survey”.
- Response: Please refer to Amended Section II, Scope of Services – TASK 1, noted above.
- Question 14: Please clarify the RESNET-approved certifications required for this contract.
- Response: Please refer to page 6 in this RFQ. The vendor is eligible to show registration for the TX HERO training in proposal submittal but must successfully complete training prior to April 1, 2011.
- Question 15: Will there be a test-in/test-out requirement and is there an approved dollar amount for each audit/assessment? How many residential homes?
- Response: No, there will not be a test-in/test-out requirement. The allocation of dollars for each audit/assessment will be determined within contract negotiations with the successful respondent(s). The City of San Antonio is targeting 5100 homes to be retrofitted within the grant period.

Question 16: Does the \$750,000 contract value include implementation?

Response: No, this contract is for audits and assessments only.

Question 17: Will there be a marketing plan established by the Better Buildings Program?

Response: Yes, CPS Energy is drafting the marketing plan to be complete in early March 2011. Respondents are encouraged to propose how they will market the program.

Question 18: How much will be allocated in dollars for each home?

Response: The allocation of dollars for each audit/assessment will be determined within contract negotiations with the successful respondent(s).

Question 19: How will the 5100 homes be selected?

Response: The Better Buildings Program will service residents on a first-come, first-served basis. The target of 5100 homes addresses the number of homes that the City of San Antonio is obligated to retrofit within the grant period. Therefore, the number of homes serviced within the Better Buildings Program is not limited to the target number. The program will service homes as long as funds are available or until the end of the grant period in June 2013.

Question 20: Is there a HERS rating required for each home audit?

Response: No a HERS rating is not required for each home audit.

Question 21: The RESNET home energy audit, please clarify what components you are looking for the report to go to the customer. What standards are you looking for to calculate the customer's cost for implementation/retrofit?

Response: Please refer to Amended Section II, Scope of Services – TASK 1, noted above.

Question 22: On page 11, paragraph F. FINANCIAL INFORMATION, there is a requirement to submit audited financial statements. Will you accept any alternative to "audited" financials, e.g. tax returns along with financials that are not audited by a CPA?

Response: Please refer to Question 2, Response.

Question 23: Will it be the responsibility of the RESNET energy auditor to serve as what was referred to at the pre-bid meeting as a "concierge" to homeowners?

Response: No, the auditor's responsibility does not include the "Concierge" function; CPS Energy staff will serve as the Concierge. The auditor will be responsible for the services outline in the Scope of Services on pages 3-6 in the RFQ.

Question 24: A description is asked of marketing programs that the respondent has been involved in. Could you clarify the involvement expected from the company awarded with this contract?

Response: The City would like Respondents to consider how they will contribute to the overall marketing plan currently in development by CPS Energy. The evaluation team will review the extent and quality of the Respondent's previous marketing initiatives.

Question 25: How much involvement in the managing of the funding sources available to the home owners will be needed from the company awarded the contract?

Response: The City would like for Respondents to consider that audit and assessment services can be funded by multiple sources i.e. additional grant funds, other local funds or by the resident.

Question 26: Must a RESENT certified auditor be used, or can a certified BPI auditor be used?

Response: The auditor can be BPI certified, however, we are also looking for the TX HERO classification which does have BPI equivalents. Please refer to website: www.resnet.us to confirm what the BPI equivalents are. It must be demonstrated that the auditor has taken the equivalents or is signed up for the classes by April 1st.

****THIS ADDENDUM MUST BE SIGNED AND RETURNED WITH THE PROPOSAL PACKAGE****



Denise D. Gallegos, C.P.M., CPPB
Purchasing & Contracts Administrator
Purchasing & General Services Department

Date _____

Company Name _____

Address _____

City/State/Zip Code _____

Signature